

# Adapting Skills for Gateway Assessment Course Outline

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This is the standard 1-day course designed by Citizens Advice. It is aimed at experienced advisers, and considers how their skills need to be adapted to be a successful Gateway Assessor. In particular it enables attendees to practice doing a Gateway Assessment. It assumes attendees already understand the concept of Gateway. It can be run by in-house trainers, but should you need external expertise, Specialised Training can run this standard course for you. Please contact [mary@specialisedtraining.com](mailto:mary@specialisedtraining.com).

The course runs from 10-4.

The topics are:

- Introductions
- The gateway interviewer role
  - Know the model of gateway assessment
  - Have a realistic view of what can be achieved
  - Authority to be flexible with target timing
- Identifying the problem
  - Use adapted exploration skills to help client explain their problem
  - Identify key information about the problem including time limits and key dates
  - Identify situations that require urgent advice or action
- Deciding next steps
  - To know how to apply understanding of criteria for next steps
- Managing the process
  - To be aware of usefulness of having a script for the start of the interview
  - To identify ways of stopping the dialogue
  - To identify when it is acceptable to overshoot time limit
- Practice session (major part of the course)
  - To apply the learning so far and to learn from practicing skills and techniques
- Overrunning target time
  - To be aware of impact of overrunning target time
  - To identify when it is acceptable to overshoot time limit and how to do it
- Case recording, follow up and supervision (not hands-on CASE training)
  - Know the bureau recording system and requirements
  - Know procedures for any follow up work such as sending/giving client fact sheets & leaflets
  - Know bureau expectations for consulting the supervisor
- Evaluation and next steps
  - To assess own understanding before starting in the role
  - To understand what follow up training is available
  - To reinforce message about support and supervision

Prior to attending this training, attendees must have done the relevant 'bite-size' learning indicated in the Gateway Record of Learning to help them understand the Gateway Role, and it would be very helpful if they have done the 'Adviceguide' e-learning as well.